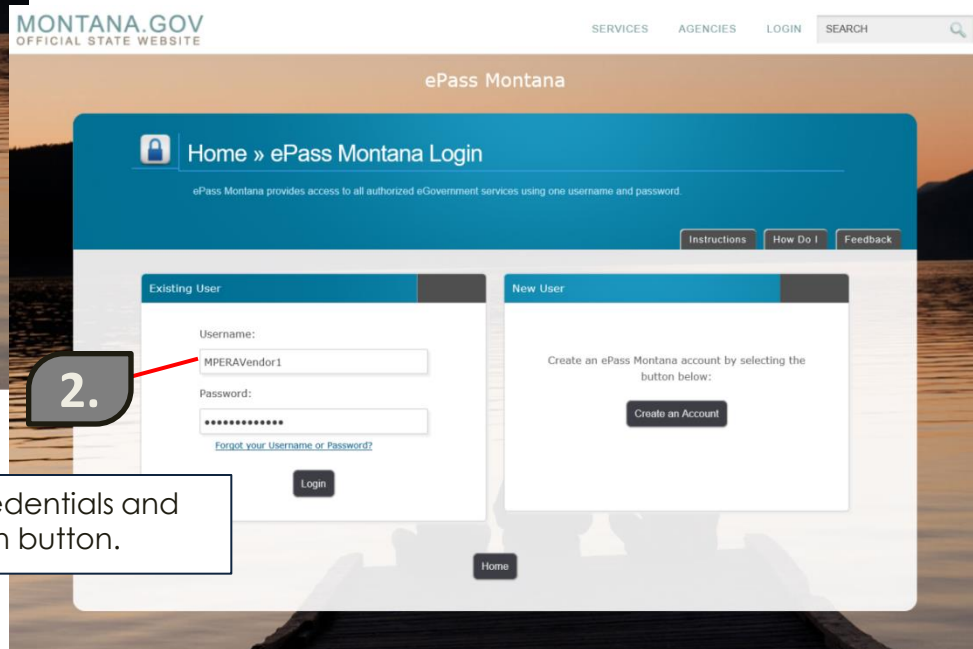
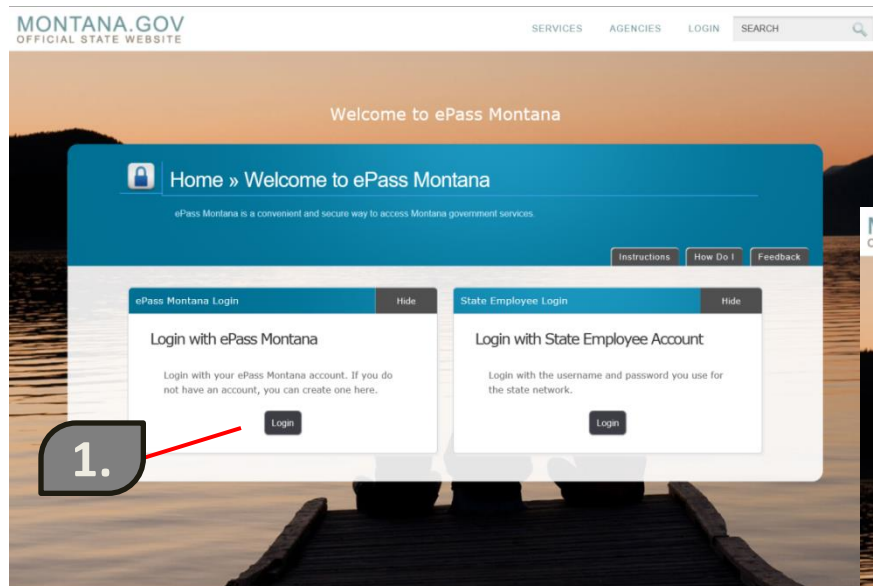


The Public Employee Retirement and Information System

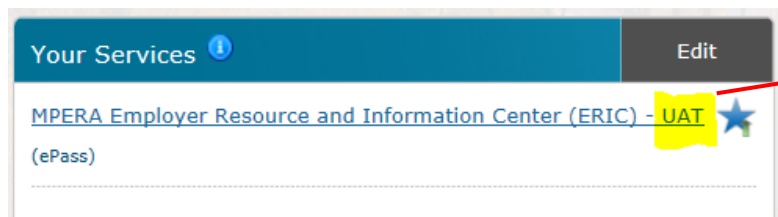
Vendor Testing Instructions

Getting Started

Log into the vendor testing site using ePass Montana: <https://tst.mt.gov/epass/portal/>. Enter the ePass credentials that were provided to you via email.




Enter your credentials and press the login button.





Please use the UAT (User Acceptance Testing) link for your testing purposes.

Getting Started

After successful authentication, you will be directed back to ERIC to select your contact.


Welcome
Employer Reporting and Information Center

 Employer Login





Contact ID :

Lookup :

3. 

Select your contact information.

4. 

 Instructions

- Please enter or select from the pull-down a contact to work with and click the 'Select Contact' button.

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Create and Update Payroll Schedules

Before you can begin uploading payroll files, you will need to create payroll schedules for your organization.

1.

Click on Organization Profile.

The screenshot shows the ERIC (Employer Reporting and Information Center) dashboard. The header includes the PERIS logo, the text 'ERIC', a 'Welcome!' message, and user information: '5200 : CITY OF BIG TIMBER -- Esther Ames (EAmes)'. The sidebar on the left lists navigation options under three main categories: 'Alerts & Messages' (Messages), 'Employer Reporting' (Employer Report Summary, Demographic Header, Demographic Detail, Enrollment Header, Enrollment Detail, Payroll Header, Payroll Detail, Upload File, Process Files, Process Records, 457 Contribution File, Pensionable Payroll Reporting, Pensionable Payroll Reporting), and 'Financial Information' (Invoice Receivable, Service Credit Purchase). The main content area, titled 'Home', contains six large tiles with icons and text: 'Alerts & Messages' (Click here to navigate to the message board screen to view messages), 'Upload File' (Click here to navigate to the upload file screen), 'Employer Reporting' (Click here to navigate to the Employer Reporting Summary lookup screen), 'Enroll New Employee' (Click here to navigate to the enrollment lookup screen), 'Employee Data' (Click here to navigate to the person lookup screen), and 'Organization Profile' (Click here to navigate to the employer maintenance screen). A blue arrow points to the 'Organization Profile' tile.

Framework : 5.0.2.5, Solution : 12/18/2015 5:30:51 AM

Client Ip : 192.10.207.17 AppSrv DOAISD7656 Current Time : 12/18/2015 10:07:18 AM Developer

Create and Update Payroll Schedule

2. ERIC displays the Employer Maintenance screen.
3. Select the Payroll Schedule tab located in the Other Details panel.

Employer Maintenance

Msg ID : 7 [Record displayed. Please make changes and press SAVE.]

[Save](#) [Refresh](#) [View Images](#)

Main Section

Organization Type : Employer

State TIN :

Federal TIN :

Preferred Communication :

Employer Pays Contribution for Service Purchase : No

Auto Submit ER File : No

Health Care Vendor Organization Name :

Primary Email : AIL_1427

Employer Ty

*Cour

Stat

Reporting Meth

Employer Pays Interest For Service Purcha

Auto Post ER F

Primary Conta

Primary Pho

Other Details

Address

Plan

Contact

Bank

Payroll Schedule

Status History

Annual Salary

Insurance

New

Open

Delete

Copy Forward

	Payroll Schedule ID	Payroll Schedule Begin Date	Payroll Schedule End Date	Frequency	System
<input type="checkbox"/>	13104	01/01/2015	12/31/2015	Monthly	SRS
<input type="checkbox"/>	13102	12/01/2014	12/31/2015	Monthly	PERS

5. Click New to create a new Payroll Schedule.

Create and Update Payroll Schedule, cont.

6. ERIC displays the Payroll Schedule Maintenance screen.

7.

- Enter in the following information:
- Organization Plan
 - Payroll Schedule Begin & End Date
 - Payroll Schedule End Date
 - Frequency
 - Subsequent Fields regarding Frequency
 - Do not Execute On (when applicable)
 - Check the First Payroll Schedule checkbox if applicable

Employer Payroll Schedule Maintenance

Msg ID : 8 [All changes successfully saved.]

Save **Refresh**

Organization Information

Organization ID : 5200 Organization Name : CITY OF BIG TIMBER
Organization Type : Employer System :

Payroll Schedule Information

Organization Plan : SRS Payroll Schedule Status : Active First Payroll Schedule : ☒

Payroll Schedule Begin Date : 04/01/2015 Payroll Schedule End Date : 06/23/2015

Frequency : Biweekly Do Not Execute On :

*First Pay Date : 04/17/2015

Populate

8.

Click the Populate button.

Payroll Schedule

Add Row **Add 10 Rows** **Delete**

	Period Begin Date	Period End Date	Pay Date/ Reporting Date
<input type="checkbox"/>	04/01/2015	04/14/2015	04/17/2015
<input type="checkbox"/>	04/15/2015	04/28/2015	05/01/2015
<input type="checkbox"/>	04/29/2015	05/12/2015	05/15/2015
<input type="checkbox"/>	05/13/2015	05/26/2015	05/29/2015
<input type="checkbox"/>	05/27/2015	06/09/2015	06/12/2015

← If you are creating a new schedule, this section only appears after you click "Populate".

9.

Click Save.



In this example you must enter the First Pay Date; however, if you select a different Frequency option from the drop down different fields will appear specific to that frequency type.

Uploading a Payroll File

Once you have set up the Payroll Schedule, you can begin uploading a payroll file.

1.

Navigate to the Upload File section.

The screenshot displays the ERIC web application interface. The top header includes the ERIC logo, a welcome message, and user information (S200 : CITY OF BIG TIMBER -- Esther Ames (EAmes)). The sidebar on the left lists various sections: Alerts & Messages, Messages, Employer Reporting, and Financial Information. The main content area, titled 'Home', contains a welcome message and six tiles for navigation: Alerts & Messages, Upload File, Employer Reporting, Enroll New Employee, Employee Data, and Organization Profile. A blue arrow points to the 'Upload File' tile, which includes the text 'Click here to navigate to the upload file screen'.



Your testing account is an organization with no employees. You will need to enroll employees for testing.

Upload a Payroll File

2. ERIC displays the Upload File screen.

Upload File

[Record displayed]

To submit a file:

1. Use the "Browse..." button to select your file
2. Click the "Upload File" button
3. Wait for Confirmation

File Type :

File :

Upload File

Employer Adjustment File

Employer Reporting Inbound file

Browse...

4. Click the Browse button to find the file.

The screenshot shows a Windows File Explorer window titled "Choose File to Upload". The address bar shows "This PC > Downloads". The left sidebar shows the "Downloads" folder selected. The main pane displays a list of files with columns for Name, Date, Type, Size, and Tags. The file "Articulate Storyline 2" is selected. At the bottom, the "File name" field contains "Articulate Storyline 2", and the "Open" button is highlighted.

Name	Date	Type	Size	Tags
EVE - PREPConf - P...	8/19/2015 6:55 AM	Microsoft Word D...	111 KB	
EVE - PREPConf - P...	8/19/2015 6:55 AM	Microsoft Word D...	111 KB	
EVE - PREPConf - P...	8/19/2015 6:55 AM	Microsoft Word D...	111 KB	
ACK - PLOP Rollove...	8/18/2015 7:22 AM	Microsoft Word D...	66 KB	
EVE - PREPConf - P...	8/17/2015 3:39 PM	Microsoft Word D...	116 KB	
EVE - PREPConf - P...	8/17/2015 3:39 PM	Microsoft Word D...	116 KB	
EVE - PREPConf - P...	8/17/2015 3:39 PM	Microsoft Word D...	116 KB	
COU - Appointment...	8/17/2015 3:35 PM	Microsoft Word D...	116 KB	
COU - Appointment...	8/17/2015 3:35 PM	Microsoft Word D...	116 KB	
COU - Appointment...	8/17/2015 3:26 PM	Microsoft Word D...	118 KB	
COU - Appointment...	8/17/2015 3:26 PM	Microsoft Word D...	118 KB	
EVE - Ret Conf - co...	8/17/2015 2:38 PM	Microsoft Word D...	38 KB	
Appointment - Initi...	8/17/2015 2:32 PM	Microsoft Word D...	119 KB	
Appointment - Con...	8/17/2015 12:13 PM	Microsoft Word D...	119 KB	
EVE - PREPConf - P...	8/17/2015 11:08 AM	Microsoft Word D...	33 KB	
EVE - PREPConf - P...	8/17/2015 11:08 AM	Microsoft Word D...	33 KB	

5. Choose the file and click the Open button.

6. Click the Upload File button.

Upload File

Correcting Errors

The two errors that you may encounter when processing Employer files are errors related to file formatting or errors related to the Header and Detail records. File formatting errors will occur when you upload a file that is incorrectly formatted and not a .csv file. This error will occur after you click the upload file button. The errors related to the Header and Detail records will occur once the Employer file has been processed. The status of these files will be in Review. These errors could be related to any record within the file.

1.

Click on the Process Files link.

The screenshot displays the MPERA ERIC web application. The top navigation bar includes the PERIS logo, the text 'ERIC', a user welcome message 'Welcome! 5200 : CITY OF BIG TIMBER -- Esther Ames (EAmes)', and a series of icons for home, back, user, messages, print, help, and a document. The left sidebar contains a tree view with categories: 'Alerts & Messages' (with a 'Messages' link), 'Employer Reporting' (with links for Employer Report Summary, Demographic Header, Demographic Detail, Enrollment Header, Enrollment Detail, Payroll Header, Payroll Detail, Upload File, Process Files, Process Records, 457 Contribution File, Pensionable Payroll Reporting, and Pensionable Payroll Reporting), and 'Financial Information' (with links for Invoice Receivable and Service Credit Purchase). A blue arrow points to the 'Process Files' link in the 'Employer Reporting' section. The main content area is titled 'Home' and features a blue banner with '[Record displayed]'. Below the banner is a welcome message: 'Welcome to the MPERA Employer Reporting and Information Center (ERIC). ERIC is your guide to a secure portal where you can view and update your organization information and view and report person information. Here is a brief description of the various activities that you can do:'. The main area contains six tiles: 1. 'Alerts & Messages' with a message icon and text 'Click here to navigate to the message board screen to view messages'. 2. 'Upload File' with an upload icon and text 'Click here to navigate to the upload file screen'. 3. 'Employer Reporting' with a bar chart icon and text 'Click here to navigate to the Employer Reporting Summary lookup screen'. 4. 'Enroll New Employee' with a person icon and text 'Click here to navigate to the enrollment lookup screen'. 5. 'Employee Data' with a database icon and text 'Click here to navigate to the person lookup screen'. 6. 'Organization Profile' with an organizational chart icon and text 'Click here to navigate to the employer maintenance screen'. The footer contains the text 'Framework : 5.0.2.5, Solution : 12/18/2015 5:30:51 AM' on the left and 'Client Ip : 192.10.207.17 AppSrv : DOA1SD7656 Current Time : 12/18/2015 10:07:18 AM Development' on the right.

Correcting Errors, continued

2. ERIC displays the Process Files Lookup screen.

Process Records Lookup

Msg ID : 1 [2 Records met the search criteria.]

Criteria

File Type : All

Cycle Number :

Original File Name :

Status : Review

Line Number :

Data :

Processed Date From :

Processed Date To :

File Header ID : 37

Search

Reset

Store Search

Search Results

Open

	Line No	Status	Record Data	Transaction Code	File Header ID	File Name	Processed Date
<input type="checkbox"/>	2	Review	001~6505~1~M	001	37	ER_Inbound_File_Enroll_Org6505.csv	4/2/2015 2:09:37 PM
<input type="checkbox"/>	3	Review	002~1~PERS	002	37	ER_Inbound_File_Enroll_Org6505.csv	4/2/2015 2:09:37 PM

3. Search for uploaded Employer Reporting Inbound File.

4. ERIC displays the search results.

5. Select the desired file and click the Open button.

Correcting Errors, continued

6. ERIC displays the Process Files Maintenance screen.

Process Files Maintenance

[Previous Page Displayed.]

File Details

File Type : Employer Reporting Inbound file
Original File Name : ER_Inbound_File_Enroll_Org6505.csv
Processed Date : 4/7/2015 10:10:44 AM
Cycle Number :
Error Message :

Status : Processed with Warnings
File Name : 2015-04-02-14-09-37_ER_Inbound_File_Enroll_Org6505.csv
Number Of Rows : 4
File Header ID : 37

Status Summary

Status	Status Count
Valid	2
Review	2

7. In the Status Summary panel, select the Detail Records that are in Review.

8. ERIC displays the Process Files Lookup screen populated with the records that are in review.

Search Results

Open

	Line No	Status	Record Data	Transaction Code	File Header ID	File Name	Processed Date
<input type="checkbox"/>	2	Review	001~6505~1~M	001	37	ER_Inbound_File_Enroll_Org6505.csv	4/2/2015 2:09:37 PM
<input checked="" type="checkbox"/>	3	Review	002~1~PERS	002	37	ER_Inbound_File_Enroll_Org6505.csv	4/2/2015 2:09:37 PM

9. Click on Line No. to display the error detail.

10. ERIC displays the Process Records Maintenance screen.

11. In the Error Details panel, the error message is displayed.

12. Correct error and upload file again.

Process Records Maintenance

[Record displayed]

File Details

File Type : Employer Reporting Inbound file
Original File Name : ER_Inbound_File_Enroll_Org6505.csv
Processed Date : 4/2/2015 2:09:37 PM
Number Of Rows : 4
File Hdr ID : 37

Cycle Number :
File Name : 2015-04-02-14-09-37_ER_Inbound_File_Enroll_Org6505.csv
Status : Review
Line Number : 3

Record Data

Enrollment Header ID : 002 Detail Count : 1
System : PERS

Error Details

ID	Error Message
	Skipping Detail Record since Header has errors

For help please contact Bill Hallinan at
(406)444-0158 or bhallinan@mt.gov